

Tendances mobiles en Europe et aux US


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FORRESTER®

A public telephone booth with a white frame and glass panels. The word "Téléphone" is written in white on a dark background above the glass. The booth is outdoors, with trees and a building in the background.

Téléphone

Téléphone

In the past decade, mobile phones have changed the way we live and communicate. In the next decade, they will change the way you do business.



**POOR GUY
WITHOUT A PHONE**

**CHECKING IN
ON FOURSQUARE**

SENDING TWEETS

CHECKING EMAIL

SENDING SMS

RECORDING VIDEO

POSTING ON FACEBOOK

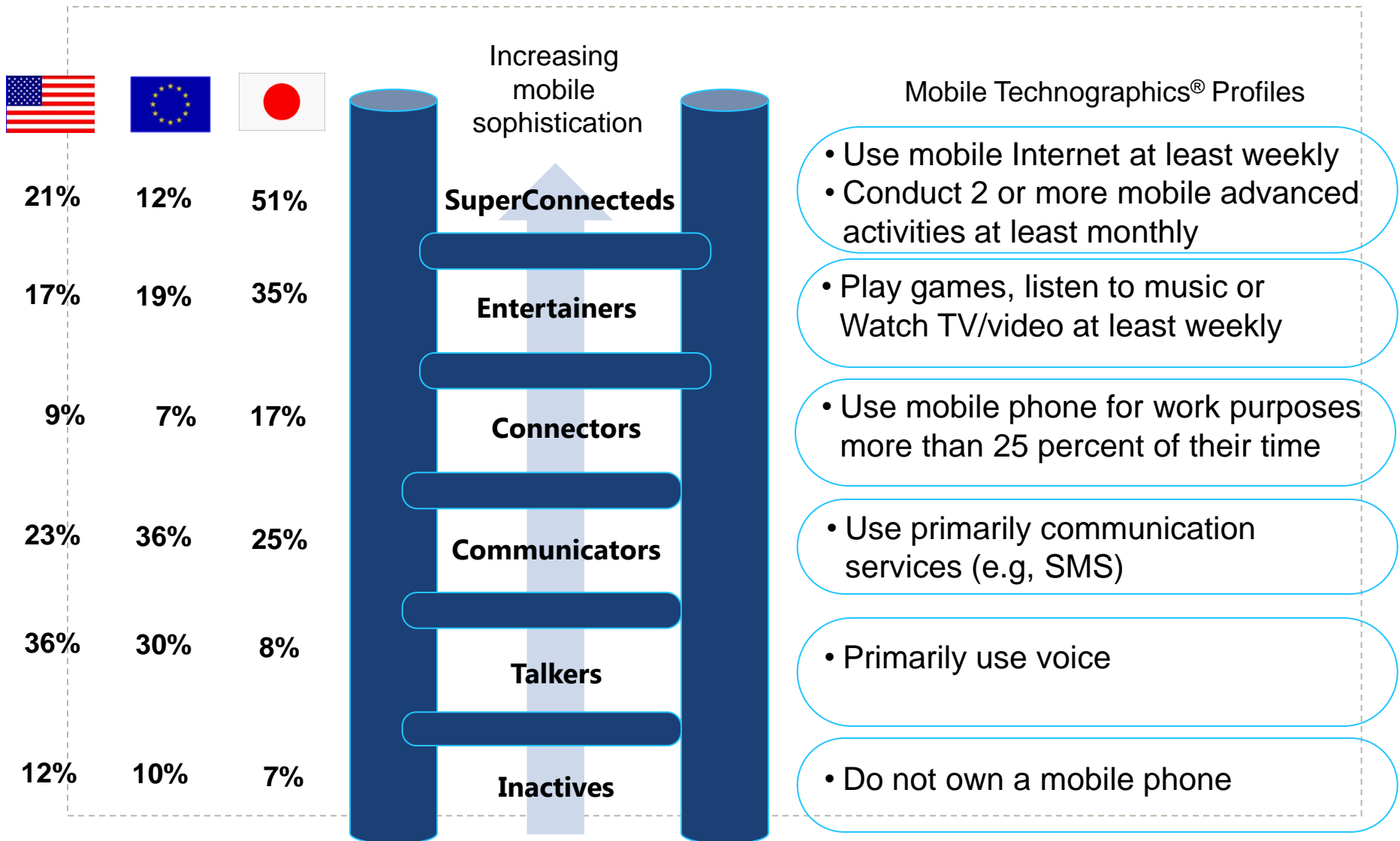
Agenda

What is the state of the mobile market in Europe and in the US?

What key mobile trends should you expect?

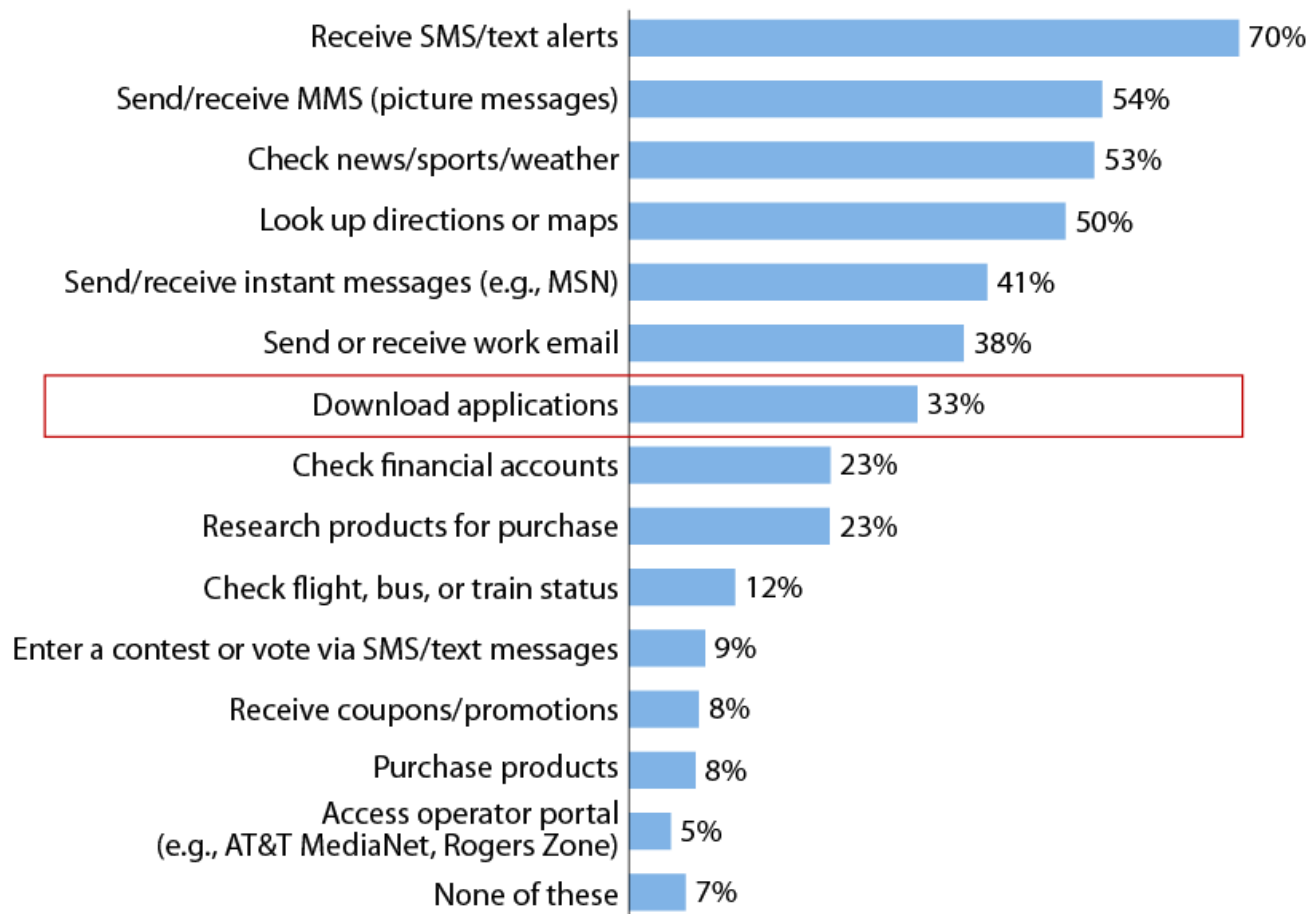
What does it mean for firms embracing mobility?

Japan is still by far the most mobile savvy country



Among US smartphone owners, application downloading quickly became a key behavior

"Which of the following activities do you do on your primary cell phone or handheld wireless device at least monthly?"

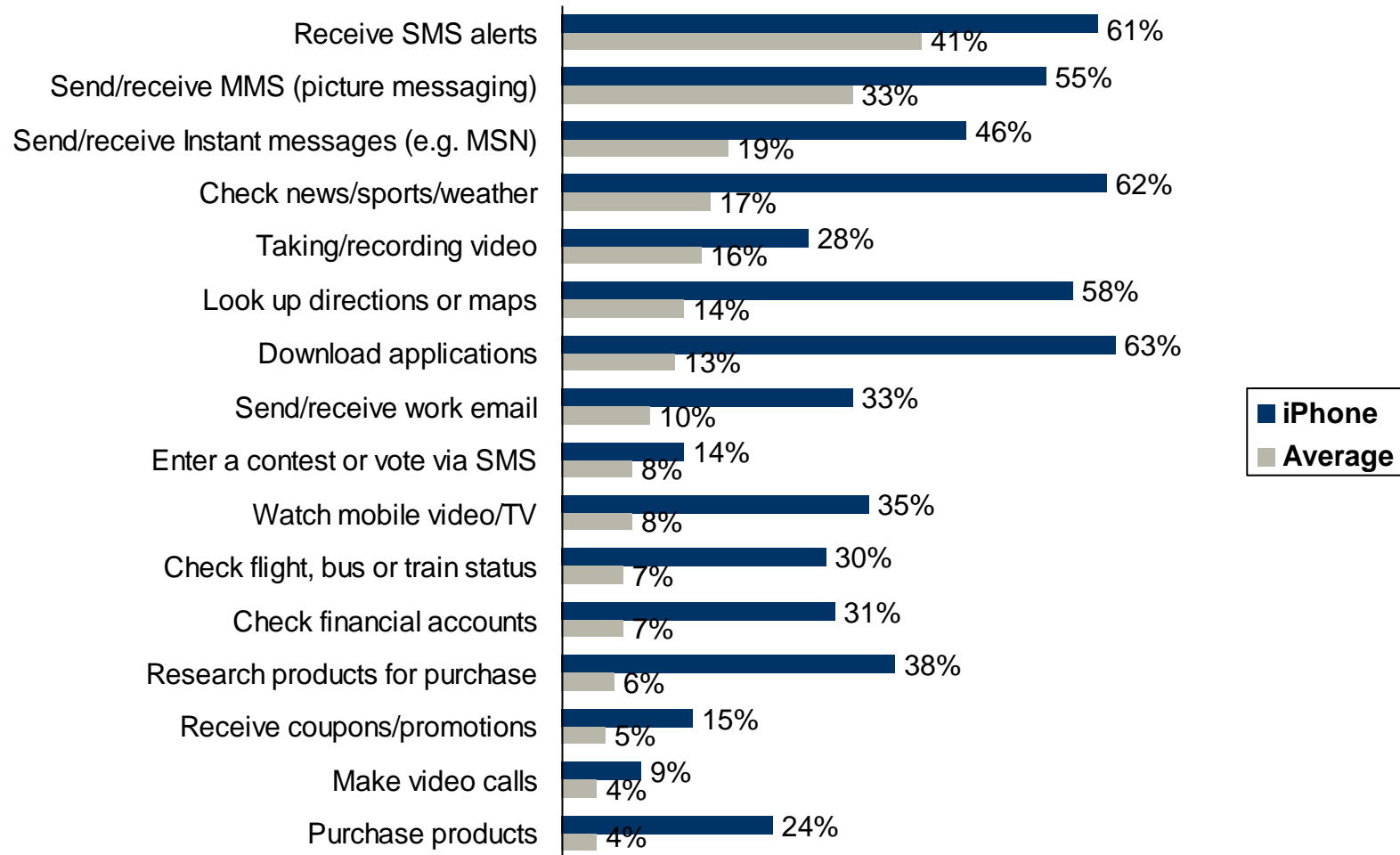


Base: 4,874 smartphone users

Source: North American Technographics® Benchmark Survey, Q2 2010 (US, Canada)

New consumer behaviors are emerging in Europe

“Which of the following activities do you do on a mobile phone at least monthly?”



Base: 13, 504 European online consumers aged 16+

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App innovation on phones will spread to cars, appliances and entertainment



bada



Windows phone

symbian
OS

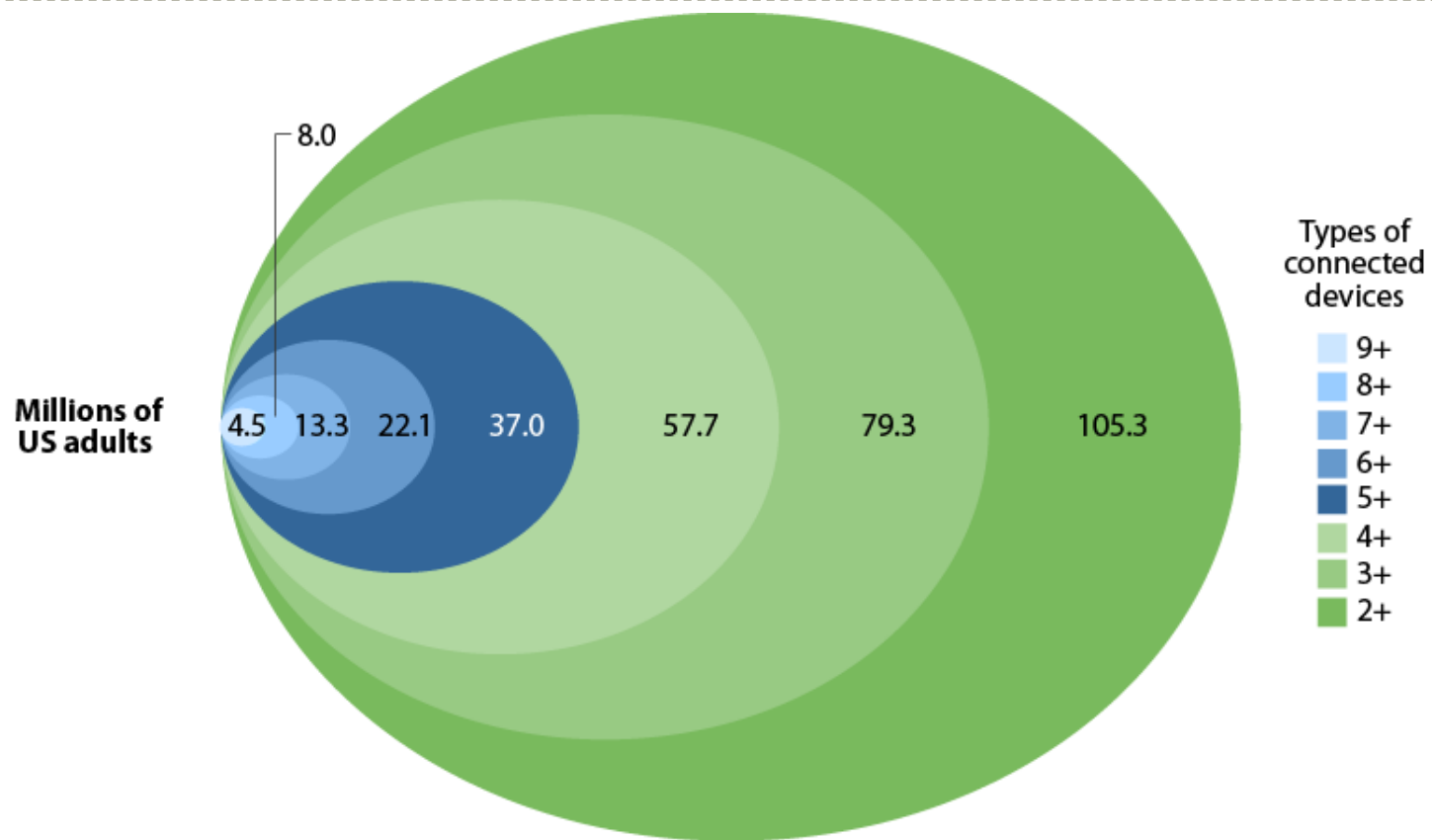
MeeGo™



webOS

- The long-term OS arms race kicked-off in 2010
- There is no silver bullet to reach them all
- Despite the Microsoft/Nokia deal and Android's significant traction, fragmentation is here to stay
- Application stores are flourishing and opening new ways to distribute content and services – not just for mobile phones

Welcome to the multidevice, multiconnection world



Base: 3,990 US online adults

Source: North American Technographics® Consumer Technology Online Benchmark Recontact Survey, Q2 2010 (US)

Use the cloud to connect multiple devices to a person



Think about your mobile services as consumer touchpoints in a multichannel environment

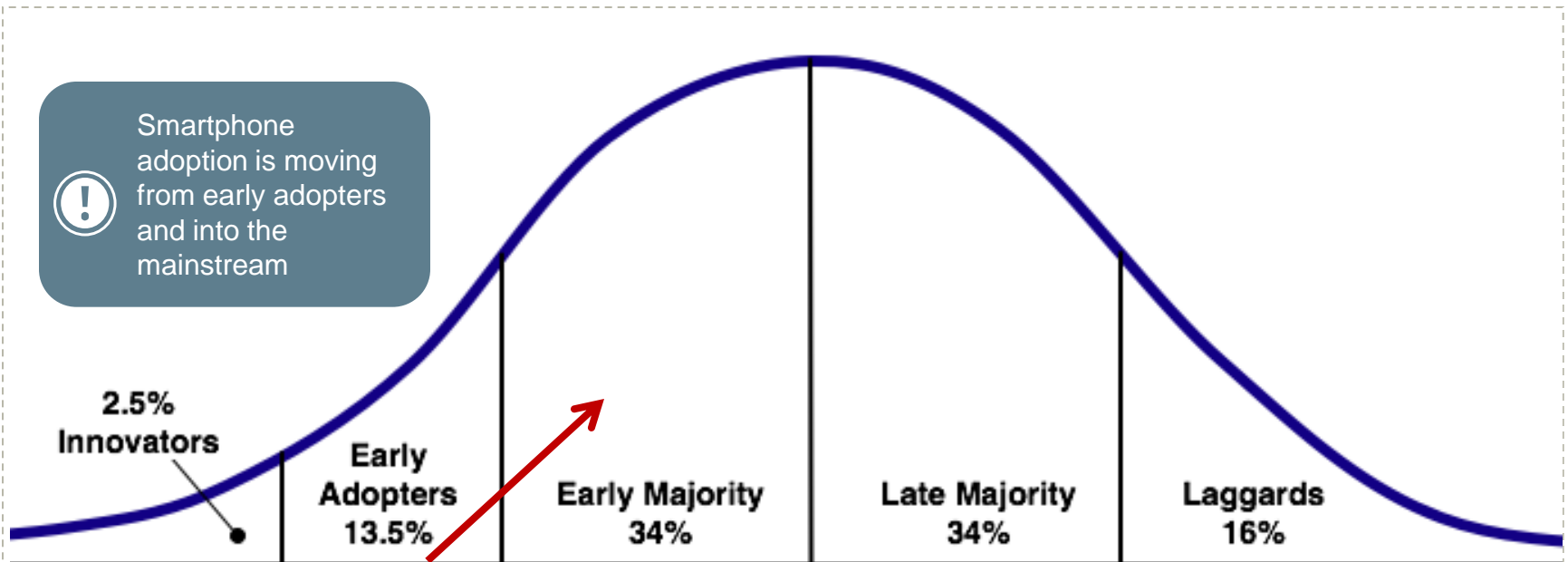
- Ask yourself the right questions: not apps vs mobile web? but which services and for which audiences?
- Expect the boundaries between widgets, apps, and mobile Web shortcuts to blur — if they exist at all — in consumers' minds
- Create a seamless multichannel user experience
- Make sure that your core target audience has your icon on their home screen

New technologies will open up a disruptive era

“NFC should revolutionize electronic commerce as well as payments »

*Eric Schmidt, CEO of GOOGLE
in his keynote at MWC 2011*

Anticipate usage dilution effects with “dumb” smartphone users



Source: Everett Rogers, Diffusion of innovations model

- Expect a less engaged, more age-diverse smartphone audience
- Usability and accessibility will become more important than ever
- More users consuming more bandwidth will change how operators market and price mobile data plans

Agenda

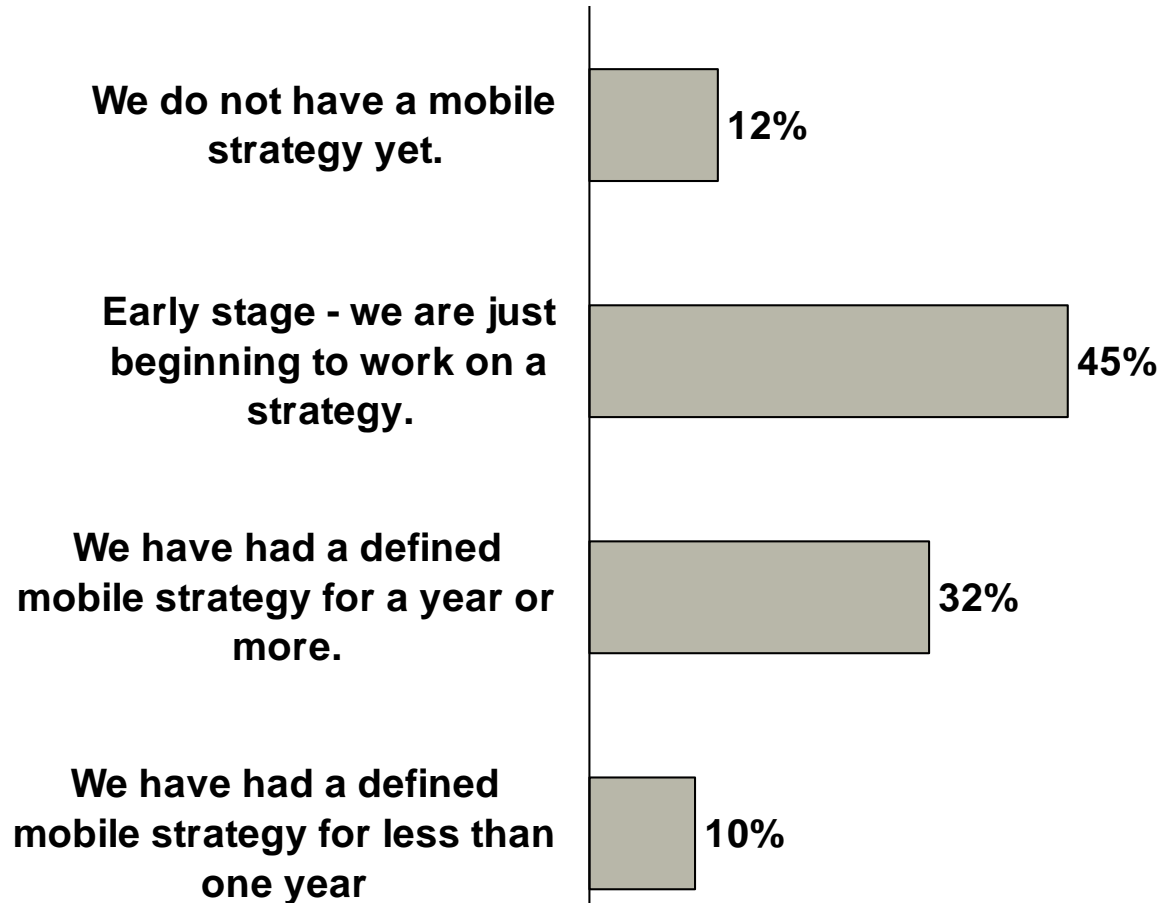
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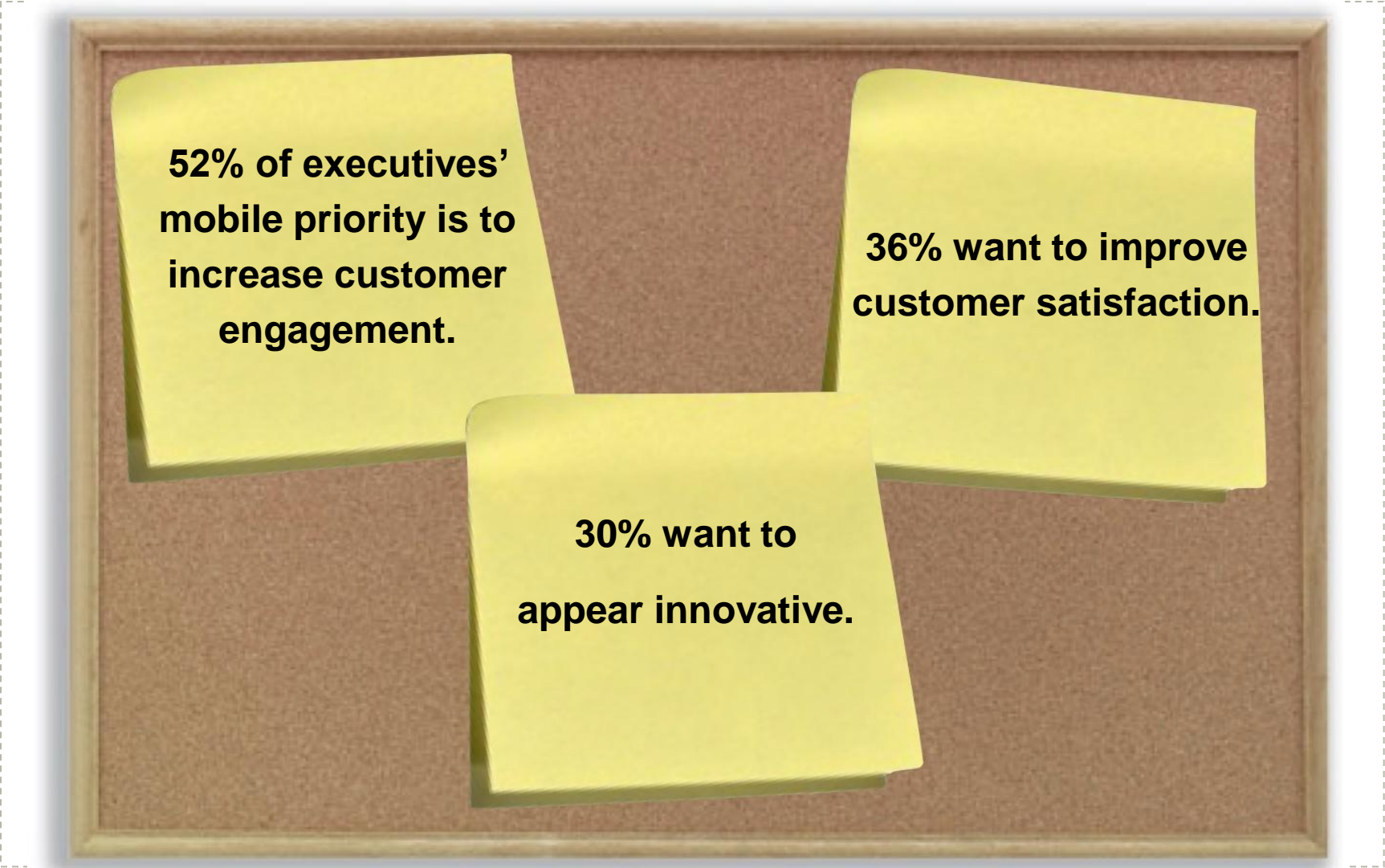
Most companies are just beginning to work on their mobile strategy

Which of the following best describes your mobile strategy today?



Base: 202 respondents

Define and quantify your mobile objectives



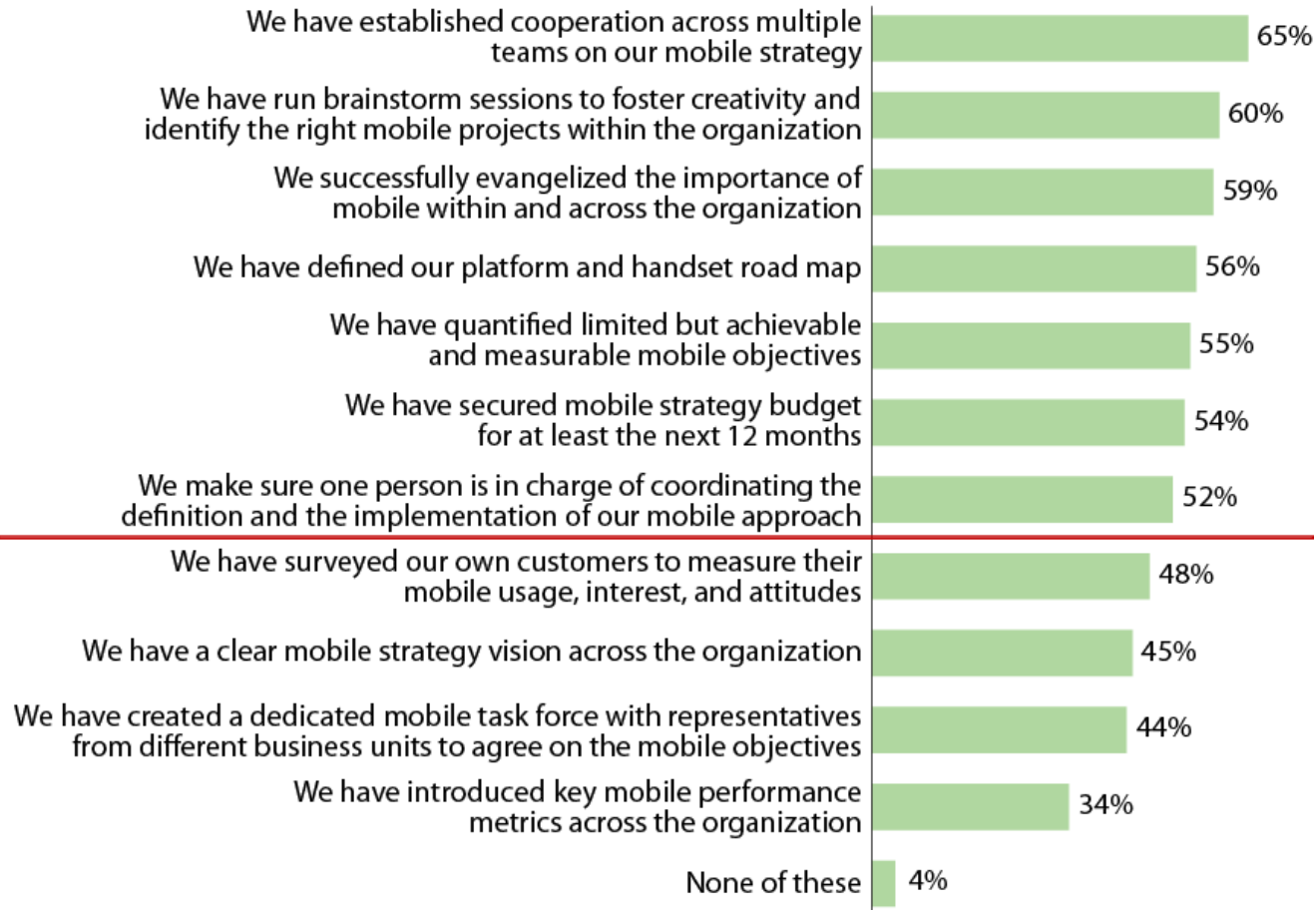
52% of executives' mobile priority is to increase customer engagement.

36% want to improve customer satisfaction.

30% want to appear innovative.

Among those who have a mobile strategy, a small majority have implemented basic requirements

“Which of the following have you already implemented?”



Base: 85 respondents that have had a mobile strategy for more than a year (multiple responses accepted)

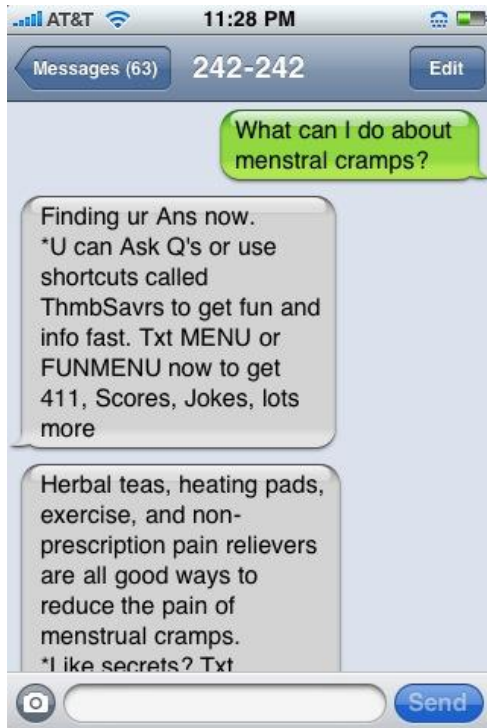
Source: Forrester's Q3 2010 Global Mobile Maturity Online Survey

A few basics for a step by step approach

- Look a step deeper inside – focus on your own customers
- Create a mobile taskforce and have a company wide conversation on mobile to anticipate short term and long term implications
- Stop operating in silos and obtain top management validation
- Build a business case by quantifying realistic objectives and allocating costs/resources
- Define a mobile roadmap for the next 12/18 months
- Measure the impact and performance of your mobile initiatives

Make the most of mobile uniqueness and offer convenience

INTIMACY



IMMEDIACY



CONTEXT



Key Takeaways

- Forget about technology and application hype
- Think about the value that mobile services and connected devices will open up for your customers
- Define what mobile mean to your brand by adopting its 3 key characteristics: intimacy, immediacy and context
- Integrate and orchestrate mobile initiatives into the overall strategy
- Build a companywide conversation about mobile
- Prioritize efforts based on customer needs and business goals

Merci pour votre attention

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